



## Request for Proposals (RFP)

**To** : Offerors  
**From** : Institute of International Education, Inc. (IIE)  
**Subject** : Humphrey Fellowship Program Enhancement Workshops

**RFP Issue Date** : July 15, 2016  
**RFP Closing Date** : August 15, 2016  
**RFP Closing Time** : 17:00 hours U.S. Eastern Time.  
**Performance Period** : {September 15, 2016 – July 31, 2017}

Enclosed is a Request for Proposals (RFP). IIE invites qualified firms and organizations (“Offerors”) to submit a best-price proposal for the requested services.

Offerors are encouraged to read this RFP in its entirety (including any and all attachments), paying specific attention to the instructions and requirements included herein. Issuance of this solicitation does not, in any way, obligate the Institute of International Education (IIE) to award a contract, nor will IIE pay for any costs incurred in the preparation and submission of a proposal. The agreement resulting from this RFP will be provided to the most responsive Offeror(s) whose Offer will be the most advantageous to IIE in terms of cost, functionality, and other factors as specified in this RFP.

### Content of RFP:

Section 1: Background and Purpose  
Section 2: RFP Condition  
Section 3: Proposal Preparation Instructions  
Section 4: Terms of Payment  
Section 5: Evaluation of Proposals

Attachment A: Statement of Work  
Attachment B: Cost Proposal/Budget Template  
Attachment C: Additional Information

The required services are described in the “**Statement of Work**” in **Attachment A**. IIE encourages your organization to indicate its interest in this RFP by submitting a proposal according to the instructions in “**Proposal Preparation Instruction**”. Proposals will be evaluated based on the “**Evaluation Criteria**”.

All proposals are due by the dates and times stated above. Any proposal received after the required time and date specified for receipt shall be considered late and non-responsive. Late proposals will not be evaluated.

**Questions:** Any questions are to be submitted **in writing** via email to the email address listed below no later than {August 1, 2016}. No questions will be entertained if they are received by means other than the specified email address. Answers to questions IIE deems relevant to this RFP will be published on {August 8, 2016} on IIE’s website under Subawards and Procurement (<http://www.iie.org/en/What-We-Do/Our-Procurements>).

HUMPHREY FELLOWSHIP PROGRAM OFFICE  
Institute of International Education, 1400 K Street, N.W., Suite 700, Washington, D.C. 20005 USA  
TEL (202) 686-8652

**Diana Schapiro**  
Institute of International Education  
1400 K Street, NW, 7th Floor  
Washington, DC 20005  
Email: HHHWorkshops@iie.org

**Proposal Submission:** Proposals, including any attachments (limited to 6MB), should be sent electronically in PDF format to: HHHWorkshops@iie.org. Be sure to include in the subject line: {Humphrey Fellowship Program Enhancement Workshops}. IIE will not accept proposals received by fax.

#### **RFP SCHEDULE**

<b>Event</b>	<b>Date</b>
RFP Issue Date	July 15, 2016
RFP Closing Date	August 15, 2016
Offerors Questions Submission Deadline	August 1, 2016
Responses to Offeror's questions	August 8, 2016
Anticipated decision and selection of Offeror	August 26, 2016
Anticipated commencement date of work	February – March 2017

## **Section 1: Background and Purpose**

### **Background: Institute of International Education**

The Institute of International Education ("IIE" or the "Institute") is a New York not-for-profit corporation that is among the world's largest and most experienced international education and training organizations. Founded in 1919, IIE promotes educational exchange around the world through a wealth of programs and services including Fellowship and Scholarship Management, Higher Education Institutional Development, Emergency Student and Scholar Assistance, and Leadership Development.

The Hubert H. Humphrey Fellowship Program is sponsored by the U.S. Department of State's Bureau of Educational and Cultural Affairs and administered through a cooperative agreement with the Institute of International Education, Inc. ("IIE").

The Hubert H. Humphrey Fellowship Program provides ten months of non-degree academic study and related professional experiences in the United States. Humphrey Fellows are selected based on their potential for leadership and their commitment to public service in either the public or the private sector. The Humphrey Program fosters a mutual exchange of knowledge and understanding about issues of common concern in the United States and the Fellows' home countries and fosters international cooperation on shared challenges. The Program offers Fellows valuable opportunities for leadership development and professional engagement with Americans and their counterparts from many nations. More than 5,000 men and women have been honored as Humphrey Fellows since the program began in 1978. Approximately 170 Fellowships are awarded annually.

### **Purpose of Request for Proposal**

The purpose of this Request for Proposal (“RFP”) is to invite qualified individuals and organizations to submit a proposal for Enhancement Workshops for the 2016-17 class of Humphrey Fellows.

Enhancement Workshops offer Humphrey Fellows opportunities to:

- Learn about major challenges facing the developing world,
- Expand their professional networking with American peers and policy-makers, and Interact with Fellows in other professional fields and from other campuses.

## **Section 2: RFP Conditions**

IIE reserves the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential Offeror or other party.
- Accept other than the lowest price offered.
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers.
- Award more than one contract.

Nothing in this RFP is, or should be relied on by Offeror as a promise or representation by IIE. IIE does not make any representation or warranty as to the completeness of this RFP or have any liability for any representations (express or implied) contained in, or omissions from, this RFP. This RFP and any replies to any written notifications are transmitted to the Offeror solely for the purposes of the Offeror preparing and submitting a Proposal.

In submitting a proposal, you must agree that your offer shall remain firm for a period of no less than **120** days from the RFP closing date.

Failure to follow the specifications and requirements provided in this RFP may result in disqualification.

## **Section 3: Proposal Preparation instructions**

Proposals are expected to be comprehensive and include the information set forth below. Offerors are also invited to send any additional information or supplemental material they believe will aid IIE in properly evaluating their service offerings. Please be sure to respond to each of the elements requested and frame your answers in direct response to the information being sought.

Include only your own work and no text copied from sources outside of your organization, unless those sources are adequately cited and credited. In order to be qualified for this RFP, all Offerors are requested to provide the following information, and format their proposal as follows:

### **1. Letter of transmittal, one page**

This letter will summarize in a brief and concise manner, the Proposer’s understanding of the scope of services and make a positive commitment to perform the work in a timely manner. The letter should name all of the persons authorized to make representations for the company. The Letter of Transmittal shall be signed by a representative who is authorized to contractually bind the company and include the agent’s title or authority. The letter should not exceed one page in length.

## 2. Basic information, one page

- Legal name, registered address, and “Remit to” mailing address, if different from registered address
- Name of authorized representative for this RFP, with telephone number(s), and e-mail address
- General information about your organization and the services it offers
- Description of relevant partnerships and business relationships

## 3. Qualifications and Capabilities

- Brief description of the organization/entity and experience in the field that illustrates overall services and capabilities to meet the terms of the RFP
- Years of relevant experience
- Staffing plan for this activity and a general overview of the expertise of the individuals included. Please include the following: name, position on your team, summary of relevant expertise and experience.
- Any plans to outsource/subcontract the services or any part thereof

## 4. Experience and References

- Description of relevant experience
- Examples of designing and similar platforms). Document similar successfully implemented activities within the past 3 years, including the following in your description:
  - Name of client
  - Activity title
  - Synopsis of the activity and relevance to this RFP
  - Performance period (date and duration)
  - Cost for the activity
- Reference contact information for similar projects. You may also include recommendation/appreciation letters as attachments

## 5. Implementation of the Statement of Work

- Detailed description of the services being offered and any information relevant to meeting the technical specifications stated in **Attachment A**
- Proposed project timeline, including total estimated hours to implement the work
- If applicable, proposed plan for platform design discussions, implementation, and testing
- Innovative approaches or technology you plan to use
- Project communication and training plan
- Methodology, and reasoning behind the methodology chosen
- Post-Implementation Services
- Quality control plan including:
  - A description of internal review procedures that facilitate high-quality standards
  - How quality control will be managed when completing multiple projects for multiple clients
- Exceptions to the RFP, additional or different ideas, in the statement of work and other requirements should be expressly noted

## 6. Cost Proposal

- Submit a detailed cost proposal, in U.S. dollars, in the recommended format shown in **Attachment B**. Please include a subsequent budget narrative to carry out this work
- Include any additional cost items that the Offeror wishes to propose
- Estimated total cost

## Section 4: Terms of Payment

Payment terms for the award shall be approximately net thirty (30) days after satisfactory completion of each deliverable or milestone agreed upon and established in the resulting agreement. Payment shall be made by the Institute of International Education ("IIE") via check or electronic funds transfer/bank wire. The final payment terms in the contract will control, not this RFP. **No advance payments will be provided.**

## Section 5: Evaluation of Proposals

Item	Requirement	Points Available
<b>Qualifications and Capabilities</b>	Assessment of the bidder's qualifications and capacity to complete the scope of work, website or portfolio aesthetic.  Staffing plan for this activity and a general overview of the expertise of the individuals included.	30
<b>Experience and References</b>	Demonstrated past experience implementing a similar scope of work.  Assessment of reference responses.	25
<b>Implementation of the Scope of Work</b>	Assessment of proposed approach to completing the scope of work, including project timeline, relevance of topic for Humphrey Fellows, and proposed platform capabilities.  Higher scores will be awarded to methodologies that indicate a greater practical understanding of implementing the work, and more innovative but realistic ways of carrying out the work.  Higher scores will be awarded to materials that are more detailed, more accessible, and/or professionally developed.	15
<b>Cost Proposal</b>	IIE's review of the cost proposal shall determine if the overall costs proposed are realistic for the work to be performed, reflect a correct understanding of the project requirements, and are consistent with the Offeror's technical proposal.  Assessment of the overall cost of the proposal.	30
<b>Total</b>		<b>100 points</b>

Offerors determined by IIE, with consultation and approval by the U.S. Department of State, to possess the capacity to compete for this contract will be selected to move into the negotiation phase of this process. Written notification will be sent to these bidders via email.

## Attachment “A”

### Statement of Work

---

A Humphrey Fellowship Enhancement Workshop should have a broad, overarching theme on a topic that expands the perspective and knowledge of Fellows who will become regional and global leaders. Humphrey Fellows’ diverse interests require that sponsors of Enhancement Workshops include a broad range of approaches in designing their workshop agendas. Enhancement Workshops should be as broadly interdisciplinary as possible and appeal to Fellows from many professional fields—education, human rights, journalism, environmental resources, public health, etc. A workshop may include a focus on a specific topical issue that Fellows could address through their various disciplines. Please see Annex B for additional information on Humphrey Fellowship Program fields of study.

Enhancement Workshops should include presentations and activities that elicit discussions about both local and global issues. Field trips to local institutions might be followed by a speaker with an international perspective who can guide Fellows through a discussion of similar issues in their countries and regions. Likewise, practical sessions, such as those that focus on developing specific skills or “hands on” training, should use case studies relevant to the Fellows’ developing world experiences. Throughout the workshop, Fellows should frequently engage in discussions with each other and the presenters about the applicability of the information to addressing their own national and regional challenges. There should be ample opportunities for Fellows to network with U.S. professional counterparts at the workshop.

The Enhancement Workshop must be able to accommodate approximately 30-40 Fellows and should be held during February or March 2017. The duration of the Enhancement Workshop may be as short as three days and as long as one week. Please note that only Humphrey Fellows participate in Enhancement Workshops and dependents may not attend.

**All Enhancement Workshop proposals must include an online component.** This can include posting videos of workshop sessions, a live webinar, or an interactive online discussion. Please feel free to include your own creative ideas. The goal of including online workshop components is to expand the reach of the workshop to Humphrey Fellows or Alumni who are not able to attend in person. Any projected expenses should be included in your proposed budget.

**Following the workshop, hosts are required to submit final program reports to IIE by June 20, 2017.** At a minimum, the program reports should include: the final workshop agenda, a list of speakers, and an overview of the workshop and evaluation results. The final invoice and financial report must be sent to IIE by July 31, 2017.

Based on these requirements, proposals to sponsor an Enhancement Workshop must address the following five elements:

- How will the workshop broaden participants’ thinking about their own professional specialty and provide them with experiences and information that will help them to connect to other professionals confronting similar challenges?
- What impact will this workshop have on the work of Fellows from various professional fields?

- What skills and approaches will Fellows learn to help them deal with the issues explored in the workshop?
- Outline of the workshop agenda, including the activities, speakers, participatory sessions, and the online component.
- Budget: Cost will be a primary consideration in assessing the feasibility of funding a workshop. To be competitive, the proposed budget should total no more than \$30,000. If your budget includes indirect costs or fringe benefits, please provide your institution's NICRA agreement. Services agreements will be cost-reimbursable only. Please include a budget narrative explaining how the costs in each line item were derived.

**Attachment "B"**  
**Cost Proposal/Budget Template**

Submit a detailed budget for the services described in the technical proposal. IIE's review of the cost proposal shall determine if the overall costs proposed are: realistic for the work to be performed, reflect a correct understanding of the project requirements, and are consistent with the Offeror's Technical Proposal.

The following is a format for the cost proposal. The Offeror may list any cost line items, but it is recommended that the Offeror follow the major categories listed below, breaking down all "lump sum" items as much as reasonably possible.

			Total Cost	IIE Request	Cost Share
<b>Personnel Costs</b>					
Staff Name 1, Title		Salary	\$		
Fringe Rate %		Fringe	\$		
Staff Name 2, Title		Salary	\$		
Fringe Rate %		Fringe	\$		
Staff Name 3, Title		Salary	\$		
Fringe Rate %		Fringe	\$		
<b>Speakers and Facilitators</b>					
Name, Title		Speaker Fee	\$		
Name, Title		Speaker Fee	\$		
<b>Office Supplies and Printing</b>					
			\$		
			\$		
<b>Transportation</b>					
			\$		
			\$		
<b>Meals and Refreshments</b>					
			\$		
			\$		
<b>Other</b>					
			\$		
			\$		
<b>Indirect Rate %</b>					
			\$		
<b>Totals</b>			\$		



## Attachment "C"

### Additional Information

#### Humphrey Fellowship Program Professional Fields

Humphrey Fellowships are awarded competitively to candidates who are mid-career professionals in many fields, among them:

- **Agricultural and Rural Development**

Suitable candidates include individuals from the public sector, private sector, and non-governmental organizations focused on agricultural and food system development and/or rural development. The field includes, but is not limited to, the following areas of specialization: food security, sustainable farming systems, agricultural research, extension management, agricultural marketing and value-chain management, post-harvest technology and food safety, trade and food policy, and rural livelihood enhancement.

- **Communications/Journalism**

Appropriate candidates include those using media in all its current forms to facilitate global development for their country. Journalists in this field could work for private media outlets or state-run public broadcasters with a focus on independent reporting and transparency. The journalists can work in any platform (print, broadcast, online) using digital and social media tools to cover a wide variety of subject beats, including but not limited to public affairs, arts and features, social issues, business news and investigative topics. Other individuals might manage the public or internal communications for non-governmental organizations, for state-run media, governmental agencies and private business enterprises.

- **Economic Development**

This field may be interpreted very broadly. Suitable candidates include policy makers and administrative managers focusing on contemporary development issues including population growth, agriculture and industrial development, poverty and income distribution, labor markets, and foreign trade. Individuals who are working in the fields of sustainable development and micro-finance in the public or private sector are also appropriate.

- **Educational Administration, Planning and Policy**

Individuals who are contributing to national or regional education planning, policy development and implementation make good candidates. University professors with an exclusively academic focus are not suitable. However, university professors in administrative or policy-making positions are eligible. Candidate profiles also include those focused in the more technical areas of education: curriculum development, instruction and learning assessment techniques, program design and adult learning, teacher training, and the use of technology in higher education. These individuals may be teachers if they also have additional responsibilities in the areas above.

- **Finance and Banking**

Suitable candidates include individuals who are involved in the management of financial institutions, the regulation of depository institutions and securities, transnational lending and trade financing, or public-private partnerships. Corporate financial managers and analysts are appropriate if they are interested in and able to convey how their work will impact the development of the country. Individuals in this field are not suitable for the Humphrey Fellowship Program if they are primarily concerned with expanding a corporate entity's market share.

- **Higher Education Administration**

This field of study is intended for individuals who devote a significant portion of their professional life to policy formation, strategic decision-making, planning and management in higher education. Individuals holding administrative or policy-making positions at institutions of higher education, non-profit organizations or government ministries are eligible. Suitable candidates also include those focused on functional areas of higher education, such as curriculum design, techniques for instruction and learning assessment, vocational and life-long learning programs, and areas of higher education administration such as financial management, student affairs,

HUMPHREY FELLOWSHIP PROGRAM OFFICE

Institute of International Education, 1400 K Street, N.W., Suite 700, Washington, D.C. 20005 USA

TEL (202) 686-8664

academic affairs, business affairs, recruitment and admissions, development and alumni relations, and the use of technology in higher education. These individuals can be faculty at institutions of higher education if they also have significant additional responsibilities in the areas listed above.

- **HIV/AIDS Policy and Prevention**

Physicians, health educators, communication specialists, and policy analysts who are interested in HIV/AIDS policy, treatment and prevention are appropriate candidates for this field. Candidates with a primary focus on clinical treatment are not appropriate.

- **Human Resource Management**

The most suitable candidates in this field are those individuals dealing with institutional change and setting personnel policies and procedures. These might be human resource managers or individuals from various fields who have been charged with re-organizing a department or ministry, for example.

- **Law and Human Rights**

Attorneys, judges, and human rights activists are the most suitable candidates in this field. The range of law specializations is far reaching; some of the more common include: constitutional, criminal, business, civil rights, family/child, alternative dispute resolution, international humanitarian, international trade, international business, intellectual property, and telecommunications law. Individuals engaged in legal and judicial reform and the administration of justice also are appropriate candidates.

- **Natural Resources, Environmental Policy, and Climate Change**

Natural resource and environmental managers are appropriate candidates for this field. Policy-makers working on the protection of natural resources, water quality, pollution control, land use, conservation, and environmental impact assessment also are suitable. Climate change is a critical emerging field open to professionals working in a range of disciplines, including policy development, clean technologies, carbon management, and response planning or adaptation to new climate patterns.

- **Public Health Policy and Management**

Physicians, clinicians with management responsibilities, health educators, and other practitioners with policy-making responsibilities in this field are suitable candidates. Past Fellows' interests have included: management of public health care organizations, health care delivery through community-based organizations, reproductive, adolescent and child health, and epidemiology in public health practice. Candidates who are primarily practitioners in their field are not appropriate. For example, dentists whose program goals are to be more effective dentists in a clinical setting are not appropriate candidates for the program. Instead, dentists or other practitioners who are interested in acquiring skills and knowledge to become better administrators of public health programs, which might, for example, promote health education in their community or country, would be a better fit for the program.

- **Public Policy Analysis and Public Administration**

This field may be interpreted very broadly. Policy issues that past Fellows addressed have included: regional economic and workforce development planning; public management and leadership; financial management in public and non-profit organizations; poverty and inequality; gender; public finance and revenue administration; domestic and foreign development policies; political transition to market-based democracy; planning and the global knowledge economy; and private sector development.

- **Substance Abuse Education, Treatment and Prevention**

Candidates in this field may be focused on problems of alcohol, drug and tobacco abuse as well as broader areas of public health that relate to substance abuse, such as HIV/AIDS, mental health, medicine, psychology, social work and counseling. Previous Fellows in the substance abuse field have come from schools and universities,

community-based treatment and prevention programs, hospitals, criminal justice settings and local or national policy agencies. Fellows in this field will have access to strong university-based research programs as well as contacts with community, state and national professionals and provider groups working in substance abuse.

Humphrey Fellows who have a background and interest in research are also eligible to link more closely with the National Institute on Drug Abuse (NIDA), one of 27 research institutes and centers of the National Institutes of Health (NIH). Candidates for Humphrey Fellowships that may be selected for special funding by NIDA must meet all the regular selection criteria, including demonstrated potential for leadership and public service, but in addition show a strong commitment to research and the development of scientific links that will lead to on-going international collaborations with NIDA in the field of drug abuse prevention and treatment. All of the Fellows in the Substance Abuse field will be part of the joint programming offered by NIDA, even if they are not directly supported by this agency.

- **Teaching of English as a Foreign Language**

Appropriate candidates include teacher trainers and master teachers in the field of Teaching of English as a Foreign Language if they are interested in teacher training, curriculum development, and methodology.

- **Technology Policy and Management**

Network administrators, engineers, and urban planners involved in formulating technology policy and planning and managing technological change and systems are suitable candidates in this field. Ministry of education officials and educators who teach technology and science in higher education institutions and can demonstrate leadership in curriculum development or administration in this field are also appropriate candidates.

- **Trafficking in Persons Policy and Prevention**

Candidates include foreign government officials, NGO activists, and media specialists who are focused on anti-trafficking issues. Humphrey Fellows can focus in areas of public administration, NGO administration, law and human rights, social work, communications and journalism, and public health as applied to anti-trafficking program management and policy-making.

- **Urban and Regional Planning**

Appropriate candidates for this field include architects, engineers, planners, urban designers, urban economists and sociologists, and historic preservation specialists. The field of Urban and Regional Planning should be broadly interpreted to include the following: urban infrastructure, transportation policy and planning, water and sanitation, town and rural planning, land use and urban design, housing and real estate development, international and comparative planning, environmental protection and planning, ecological land development, public policy, social policy, urban redevelopment policy, economic development and planning, regional economic integration, economic conversion, urban finance management, and urban spatial analysis using geographic information systems.